

Public Opinion Research
& Strategy



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EXHIBIT 13
DATE 3-26-13
HB HR 4

TO: Interested Parties

FROM: Dave Metz
Fairbank, Maslin, Maullin, Metz & Associates

Lori Weigel
Public Opinion Strategies

RE: Key Findings from Recent Montana Voter Survey on Conservation Issues

DATE: May 30, 2012

The Democratic polling firm of Fairbank, Maslin, Maullin, Metz & Associates (FM3) and Republican polling firm of Public Opinion Strategies (POS) recently partnered to complete a statewide survey of Montana voters on behalf of the Montana Conservation Voters Education Fund to assess public attitudes about a variety of conservation issues facing the state.¹ The survey results show that Montana voters place a high value on the contribution that the state's land, water and wildlife make to its quality of life, particularly through providing extraordinary opportunities for outdoor recreation. And they are strongly supportive of policies that will protect the state's remarkable natural heritage – from supporting protections for critical public lands and wilderness areas to backing the use of new anti-pollution technology at the Colstrip coal plant.

Among the key specific findings of the survey were the following:

- **Voters rank enjoying outdoor recreation as one of the most essential Montana values.** As detailed in **Figure 1** on the following page, fully 97 percent of Montana voters agree (and 85 percent agree “strongly”) that enjoying outdoor activities is an important Montana value. There is a broader consensus around the critical role of outdoor recreation than there is around any other value tested in the poll. Sizable numbers of voters “strongly agree” that a number of other items related to the state's natural resources constitute important Montana values – including “preserving farm and ranchland” (81 percent), “having clean air and water” (74 percent), and “protecting Montana's wild lands and forests” (57 percent).

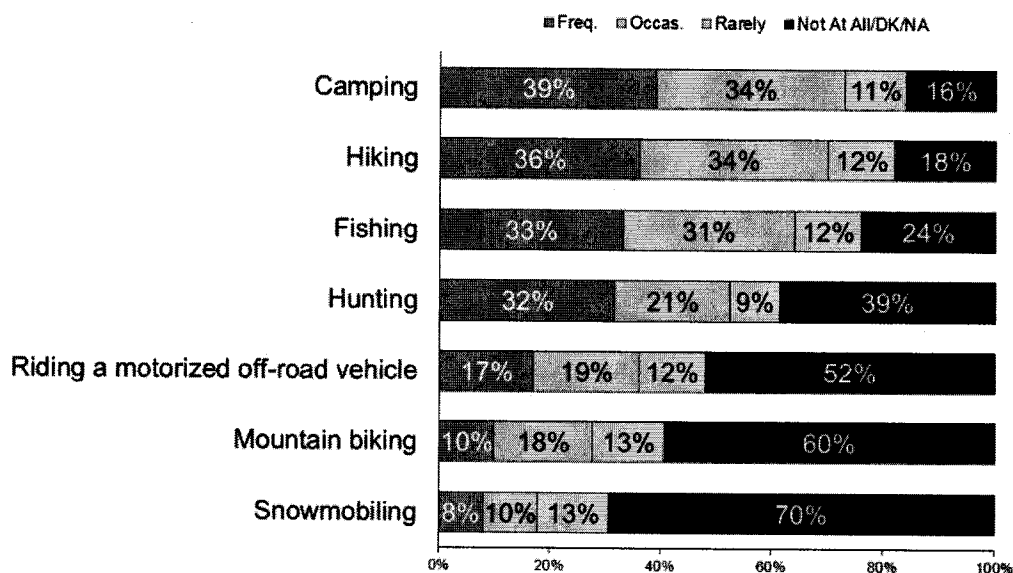
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Figure 1: Agreement That Items Represent “Important Montana Values”

Item	Strongly Agree	Somewhat Agree	Disagree/ DK
Enjoying outdoor activities such as hiking, biking, hunting, fishing, and skiing	85%	12%	4%
Having a good-paying job	81%	12%	8%
Having a strong economy so our kids stay in Montana	81%	12%	6%
Affording a home	76%	19%	6%
Preserving Montana’s farm and ranchland	74%	19%	7%
Having clean air and water	74%	21%	4%
Protecting farming and ranching	73%	21%	6%
Having easy access to Montana’s lands for hunting, fishing and recreation	62%	26%	14%
Being the last best place	60%	26%	15%
Protecting Montana’s wild lands and forests	57%	32%	12%

The extremely high value Montanans place on outdoor recreation stems from the fact that so many of them engage in it. As detailed in **Figure 2**, majorities of Montana voters at least “occasionally” participate in camping, hiking, fishing and hunting – far higher rates of participation than we have seen in most other states around the country where we have completed similar research. Sizable numbers are at least occasional participants in other kinds of mechanized outdoor recreation as well, including ORV use, mountain biking, and snowmobiling.

Figure 2: Frequency of Participation in Outdoor Recreational Activities By Montana Voters



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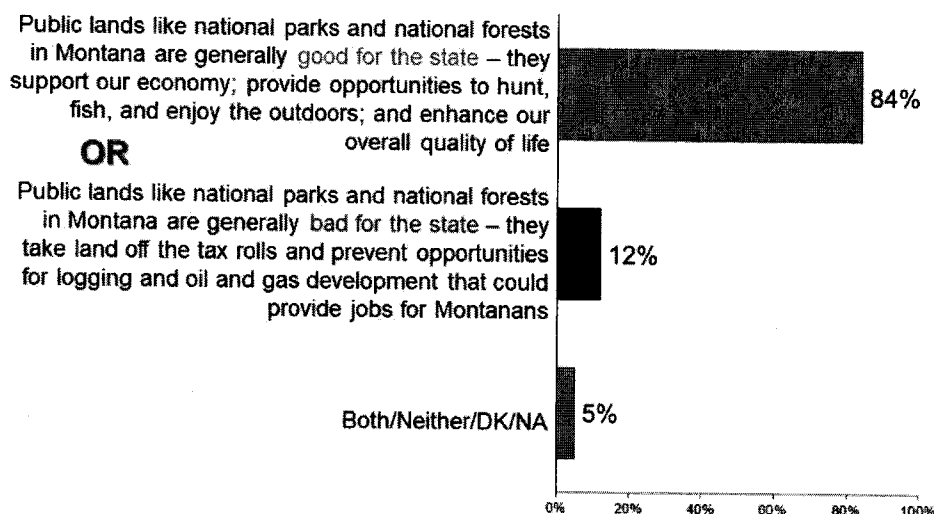


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- **Voters overwhelmingly perceive the presence of public lands in Montana as good for the state.** As detailed in **Figure 3** below, when voters are offered two different characterizations of the role of public lands in the state, the vast majority opt for a description which characterizes them as good for the state. More than four in five see multiple benefits of public lands for Montana, while only about one in ten primarily believe such lands are detrimental.

Figure 3: Perception of the Impact of Public Lands on Montana



This perception is widespread among nearly every subgroup of the Montana electorate. In fact, the view that public lands are good for the state is shared by:

- 95% of Democrats, 83% of independents, and 75% of Republicans;
 - 94% of liberals, 88% of moderates, and 74% of conservatives;
 - 88% of women and 79% of men;
 - 82% of those whose household income is dependent on the farm and ranch economy, and 88% of those whose household has no such economic ties;
 - 86% of those under age 50, and 81% of those age 50 and over;
 - More than 80% of residents of Eastern, Central, and Western Montana; and
 - At least two-thirds of those who frequently participate in each of the recreational activities detailed in *Figure 2*.
- **Voters strongly support policies to promote the conservation of National Forests – and oppose those that would jeopardize it.** As shown on the following page in **Figure 4**, voters support a wide range of federal policies designed to promote the conservation of National Forests – including the Forest Jobs and Recreation Act, the Rocky Mountain Front Heritage Act, and the North Fork Flathead Watershed Preservation Act – each of which has the backing of more than two-thirds of Montana voters. Conversely, more than two-thirds of Montana voters oppose two policies that could weaken protections for public lands – the Wilderness Study and Roadless Release Act, and the National Security and Federal Lands Protection Act.



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Figure 4: Support for Policies Related to National Forests in Montana

Policy	TOTAL SUPPORT	Strong Support	Somewhat Support	Total Oppose	DK/NA
The Forest Jobs and Recreation Act, a partnership with timber companies and conservation groups, which protects wilderness areas on three national forests, while also requiring the Forest Service to increase logging for jobs and forest health.	79%	40%	39%	17%	5%
The Rocky Mountain Front Heritage Act, which protects existing uses and access, and fights invasive weeds in the Lewis & Clark National Forest, while adding acreage to the Bob Marshall and Scapegoat wilderness areas.	72%	36%	36%	24%	4%
The North Fork Flathead Watershed Protection Act, which prohibits new mining and oil and gas leases on public land upstream from Flathead Lake and bordering Glacier Park, in order to protect water quality.	69%	43%	26%	27%	4%
The Wilderness Study and Roadless Release Act, which would remove existing protections for Montana's six million acres of undeveloped national forest backcountry, opening it up for motorized traffic, energy development, timber and mining.	38%	16%	22%	59%	3%
The National Security and Federal Lands Protection Act, which would give the Department of Homeland Security access and authority over public lands within 100 miles of the Canadian border, like Glacier National Park and Charles M. Russell National Wildlife Refuge.	27%	12%	15%	68%	5%

- **Voters also perceive wilderness protections as having positive effects on the state.** Survey respondents were offered a brief explanation of wilderness designations, as detailed in **Figure 5** on the following page. Given this description, more than four in five Montanans (85%) assess wilderness protections as being good for the state – more than seven times as many as perceive them as bad for the state (11 percent). Support for wilderness designations cuts across the electorate in much the same way as support for public land conservation in general. Wilderness is perceived to have a good impact on Montana by:
 - 95% of Democrats, 87% of independents, and 75% of Republicans;
 - 96% of liberals, 90% of moderates, and 77% of conservatives;
 - 91% of women and 79% of men;
 - At least 82% of residents of Eastern, Central, and Western Montana; and
 - 87% of frequent mountain bikers, 72% of snowmobilers and 65% of motorized off-road vehicle users.

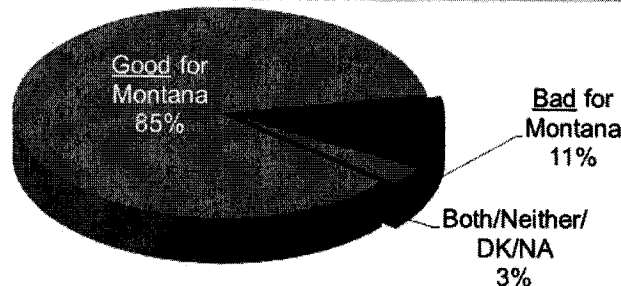
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Figure 5: Perceived Impact of Wilderness Designations on Montana

By law, only Congress may designate any large, undeveloped area of National Forest as wilderness – like the Bob Marshall or the Beartooths – in order to keep it conserved in its natural state.

When land is designated as wilderness, the area continues to be used for hunting, fishing, camping, hiking, floating, horseback riding and non-mechanized outdoor recreation, but not for mining, new roads, logging, energy development or driving off-road vehicles.

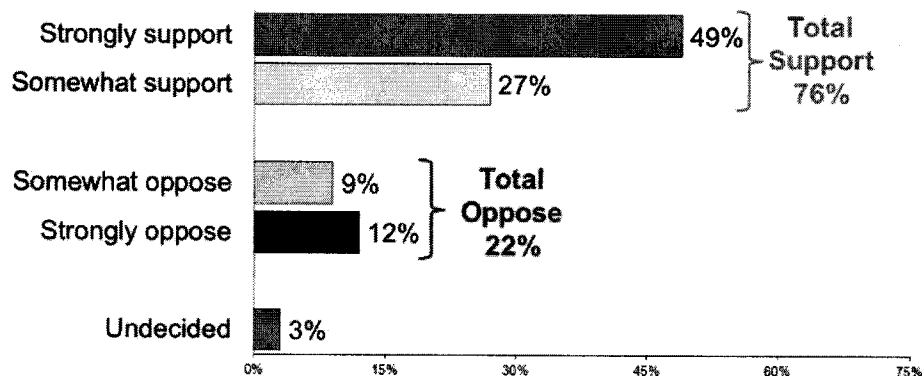
Would you say that having these wilderness areas is generally:



- **Montana voters would like the Colstrip power plant to install industry-standard anti-pollution technology.** Figure 6 below shows results of a question in which residents were asked to indicate whether they wanted the Colstrip power plant to install anti-pollution technology currently in wide use. Not only do more than three-quarters of voters back the idea (76%), but roughly half the electorate “strongly” supports the EPA requiring the plant to install such technology.

Figure 6: Support for Installation of Anti-Pollution Technology At the Colstrip Power Plant

The Colstrip power plant east of Billings, owned and operated by Pennsylvania Power and Light, operates four coal-fired generating units. Would you support or oppose the Environmental Protection Agency requiring PPL to install industry-standard anti-pollution technology?



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Taken together, the findings of this year's survey confirm those of much past research: **Montana voters place an extremely high value on conserving the state's land, water, and wildlife, and are strongly supportive of policies that will help to accomplish that goal.**

ⁱ **Methodology:** From May 9-12, 2012, FM3 and POS completed 504 telephone interviews with registered voters in Montana. The margin of sampling error for the full sample is +/-4.4%; margins of sampling error for subgroups within the sample will be larger. Some percentages may sum to more than 100% due to rounding. The survey was funded with the support of the Wilburforce Foundation, the Sustainability Fund of the Flathead, and the Cinnabar Foundation's "Tawney Bonus Fund."



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